



# **RESPONDING TO GOVERNMENT RFPs:**

## **A Proponent Guide to the Request for Proposals Process in the Government of British Columbia**

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Solutions BC  
Common Business Services

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# 1 INTRODUCTION

This guide has been developed to provide information to individuals and businesses interested in competing on contract opportunities with the Government of British Columbia. In particular, it explains the competitive process followed by government to solicit proposals for contract opportunities: the Request for Proposals (RFP) process.

What will I find in this guide?

This guide explains the RFP process, walks readers through the document used by government to request proposals, and provides guidance on how to respond to an RFP. In addition, this guide outlines the information gathering and pre-qualification activities that government may undertake in conjunction with an RFP process.

Is one government office responsible for coordinating all RFPs in government?

No. Responsibility for the RFP process is decentralized in government, with each ministry having the authority to solicit proposals and enter into contracts for services in support of its own programs. Ministry procurement activity is supported by:

- Common Business Services (CBS), Ministry of Labour and Citizens' Services, and
- the Procurement Governance Office, Ministry of Finance.

Both of these offices have a corporate role in supporting effective procurement and contracting practices in government.

Ministry-specific legislation provides the authority for ministries to contract for services in support of their programs. In addition, the [\*Procurement Services Act\*](#) provides the authority for CBS to compete and enter into contracts on behalf of ministries.

When would CBS issue an RFP on behalf of a ministry?

Government policy requires that all RFPs for Information Technology purchases valued at \$500,000 or more, and any RFPs for goods, be competed through CBS. In addition, at the request of ministries, CBS can assist with any and all aspects of an RFP for service opportunities, and must review all RFPs for Information Technology purchases valued at between \$100,000 and \$500,000. Consequently, an RFP may be issued directly by a ministry with CBS as the contact location, it may be issued by CBS on behalf of a ministry, or it may be completely managed by a ministry.

Does this guide apply to RFPs issued by all public sector organizations?

No. This guide reflects only the RFP process in the Government of British Columbia. Although other public agencies and the private sector may make use of a similar process to solicit proposals, their rules will be

somewhat different and guidance should be obtained directly from those organizations.

Why are there so many rules around government's procurement and contracting processes?

The rules governing procurement and contracting practices in the Government of British Columbia are in place to ensure government obtains good value for the tax dollars spent, through a process that is fair and open. These rules, which are documented in [government policy](#), balance the objective of getting good value for money with a process that is fair to both ministries and vendors. This policy also reflects the expectations for fair and open procurement processes that are embodied in the [Procurement Services Act](#) and the [Agreement on Internal Trade](#).

What if I cannot find the answer to my question in this guide?

Questions related to a specific RFP or a ministry's RFP process should be directed to the contact person identified in the RFP document.

Questions about the RFP process in general can be directed to CBS, to either of the following branches:

- [Purchasing Services Branch \(PSB\)](#); or
- [Strategic Acquisitions and Technology Procurement \(SATP\) Branch](#).

Questions about government policy or concerning a complaint with the RFP process should be directed to the [Procurement Governance Office](#).

## 2 THE REQUEST FOR PROPOSALS PROCESS

### What is a Request for Proposals?

Government ministries use a Request for Proposals (RFP) solicitation method when they want to review and consider implementing different and new solutions to a problem, project, or business process. An RFP process is most often used to acquire services, although it may also be used to compete an opportunity to provide goods. An RFP may be issued when:

- a ministry has a situation for which it is not sure of the best solution;
- a ministry wishes to consider factors other than price in selection of a contractor;
- a ministry would like to see what the experts suggest;
- the requirement is complex;
- a program is new and the ministry would like ideas on how to deliver it; or
- a ministry would like to see if there are alternatives to the way it usually acquires a good or service.

An RFP involves government presenting an overview of perceived or expected requirements and asking for proposals from interested vendors. The term RFP refers to both the Request for Proposals solicitation method and to the Request for Proposals document, which is the tool for soliciting proposals. Proposals submitted in response to an RFP are evaluated using multiple criteria, such as price, qualifications and experience, and the proposed solution or approach.

An RFP can range from a single-step process for straightforward procurement opportunities to a multi-stage process for complex and significant opportunities. A multi-stage process may involve an information gathering phase and/or a pre-qualification process before the RFP is issued.

### What is the information gathering phase?

For complex requirements or projects, government may want to obtain information on the availability of the desired goods or services, the availability of potential suppliers, or the level of interest from the vendor community before going to the marketplace with an RFP. Two documents are commonly used by government to gather information: a Request for Information (RFI) and a Request for Expressions of Interest (RFEI).

An RFI is used to obtain specific information about a product, service, or process, as well as the availability and performance of the product or service.

An RFEI is normally used when ministries know that a product or service is available but are not sure if the vendor community is available to compete on the opportunity or even interested in providing the product or service.

What is the pre-qualification process?

Government may opt to use a Request for Qualifications (RFQ) process to pre-qualify vendors for a known or unknown opportunity. If an RFQ is used as the first stage in a multi-stage solicitation process, only those vendors who successfully respond to the RFQ and meet the qualification criteria will be included in the subsequent RFP process. An RFQ process can also be used to pre-qualify vendors who are interested in supplying goods and services in the future—if, as, and when requested. A pre-qualified supplier list, which may be ranked, will normally be produced as a result of this process for use in selecting contractors for future opportunities.

What is the difference between an Invitation to Quote and an RFP?

An Invitation to Quote (ITQ) and an RFP are both solicitation documents. An ITQ and an RFP differ in what is being competed: ITQs look for the best price and RFPs look for the best solution.

An ITQ is used when the only competing factor is price. The vendor community is asked to submit quotes on an opportunity and the lowest qualified quote is awarded the contract. ITQs are most often used to acquire goods.

With an RFP, the proposals are evaluated against multiple criteria addressing factors such as price, qualifications and experience, and the proposed solution or approach. The best proposal will be awarded the contract and the best proposal may, or may not, have the lowest price. RFPs are most often used to acquire services.

What is a proponent?

When government invites proposals, the term *proponent* is used to describe an individual, company, or society that submits, or intends to submit, a proposal. In government, the terms *vendor* and *supplier* are often used interchangeably with the term *proponent*. For the purposes of this guide:

- a vendor is any party (individual, business, or society) that is in the position of being able to sell goods or services to government;
- a supplier is a vendor who has been selected through a procurement process to supply government with goods or services; and
- a proponent is a vendor who submits a proposal in response to an RFP document.

## What steps does an RFP usually involve?

Each RFP will be unique. However, there are some common steps and decision points that are followed when moving from an identified need to the delivery of the required goods or services. These steps are as follows:

1. The ministry identifies a need.
2. The ministry may consult Common Business Services (CBS) to assist with identifying and assessing procurement options.
3. An RFI may be issued to gather background information, such as the availability of a service, to be used in developing the RFP document.
4. An RFEI may be issued to obtain information on the level of interest in the planned service opportunity.
5. An RFQ may be used to pre-qualify suppliers for a future opportunity.
6. Once the requirement is fully defined, the RFP document is drafted and evaluation criteria are determined.
7. The ministry, or CBS on behalf of the ministry, issues the RFP document.
8. A Proponents' Meeting is often held. This information session is open to all potential proponents and other interested parties.
9. The ministry receives the proposals, which are evaluated by the evaluation committee.
10. The ministry selects and notifies the successful proponent and then notifies the unsuccessful proponents.
11. A contract is negotiated and signed with the successful proponent.
12. Individual debriefing sessions may be held with unsuccessful proponents.
13. The service is performed or the goods are delivered.

## How long can I expect the process to take?

The time it takes to complete an RFP—from the day it is issued until the successful proponent signs the contract—can be days, weeks, or months. The length of time for the process can vary significantly, depending on factors such as the number of proposals submitted, the complexity of proposals received, the overall complexity of the project, and the ability to convene meetings with the evaluation team. The RFP may provide an outline of the anticipated time frame, although vendors should be aware that the outlines are estimates only and target dates are sometimes not met.

Any questions about the anticipated time frame should be directed to the contact person listed in the RFP document.

Is BC Bid used by government to advertise all RFPs?

Government requires that all contract opportunities for services valued at \$100,000 or more and all contract opportunities for goods valued at \$25,000 or more be posted on [BC Bid](#). Contract opportunities valued at less than these thresholds will be posted on BC Bid at the discretion of the ministry or CBS.

Can I be automatically notified of government opportunities?

For a small annual fee, vendors can subscribe to BC Bid and create a custom commodity profile. BC Bid will automatically notify registered vendors, via e-mail, of any new opportunities that match their commodity profile. BC Bid will also automatically advise BC Bid subscribers, via e-mail, of amendments to previously issued opportunities that match their profile.

### 3 THE REQUEST FOR PROPOSALS DOCUMENT

Is there a standard Request for Proposals document used by government?

Yes. Government uses two standard Request for Proposals (RFP) documents: one for Information Technology projects and another for all other projects. These standard RFP formats have been developed for use with standard government contracts, resulting in a set of standard contract terms and conditions being included in each RFP document.

What information will I get from the RFP document?

An RFP document provides proponents with information relevant to the requirement, including:

- information about the role of the ministry and the background of the project or requirement;
- location of ministry or client site(s);
- scope of the project and any restrictions on the scope of work;
- key deliverables or outcomes;
- benchmarks outlining the ministry's expectations, such as a proponent's experience and qualifications;
- risk and critical success factors;
- performance standards;
- governing legislation;
- reporting requirements; and
- any information that has already been made available to any potential proponent.

An RFP document will also provide parameters for submitting proposals; describe how proposals will be evaluated; state the terms and conditions for proposal acceptance and contract award; and identify where to address questions. An RFP document will often include:

- a cover page that identifies a ministry contact person; the closing date, time, and location; and any scheduled Proponents' Meeting(s);
- definitions of terms used in the document and an overview of administrative requirements;
- a brief description of the program or project for which vendors are being asked to submit a proposal;
- a short description of the existing situation in the ministry or program area issuing the RFP and information on how the completed project will impact the functioning of the ministry;
- the scope of, and requirements for, the project that is the subject of the RFP;

- mandatory evaluation criteria;
- desirable evaluation criteria;
- information on the expected proposal format, such as the structure and length of the submitted proposal;
- an overview of the expected content for each proposal; and
- a copy of the terms and conditions that will be included in the contract with the successful proponent.

What are mandatory criteria?

Mandatory criteria are requirements that a proposal must meet in order for it to be considered. They are objective, project-related or administrative criteria that, when evaluated, will be answered with a 'yes' or a 'no.' If a mandatory criterion is not met, the proposal will not receive any further consideration.

What are desirable criteria?

Desirable criteria define what the proposals will be evaluated and compared against. They can usually be broken down into three key areas: price, qualifications and experience, and the proposed solution or approach.

What do the percentages or points noted beside the evaluation criteria mean?

An RFP will usually include relative weightings for each category of desirable criteria. These weightings, which may be indicated as available points for a category or as a percentage of total points available for the proposal, will be applied during the evaluation process. For example, if the *Experience* criterion is assigned 25 points, it means that a maximum of 25 points are available for experience out of the total points available for the RFP.

Are evaluation criteria other than those identified in the RFP used?

No. The evaluation committee can evaluate a proposal only in accordance with the criteria and weightings provided in the RFP. However, in most instances, an RFP will not provide a detailed breakdown of how the ministry intends to award points within each criterion.

Can I completely miss a category of desirable criteria and still be successful?

Yes. It is possible, but it is unlikely.

Many RFPs include minimum scores, which are also called upset scores, for all or a subset of the desirable criteria. If a proposal does not achieve any of the minimum scores defined in the RFP, the proposal will not receive any further consideration.

For example, assume an RFP assigns 30 points for *proponent experience*, but the ministry has decided that experience is of enough importance that it would be unwilling to enter into a contract with a proponent that did not achieve a minimum score of 15 points. In this situation, proposals will

need to achieve 50% of the marks available for the *proponent experience* category in order to receive further consideration.

Can I ask questions about information presented in the RFP document?

Yes. Questions are always possible. However, proponents need to recognize that the ministry's response will be shared with all interested proponents if it includes new information that is relevant to the RFP.

If an element of the RFP needs to be clarified or additional information is required before a proponent can determine whether or not to submit a proposal, questions can be forwarded to the contact person identified in the RFP. Proponents may also want to ask whether the service was contracted previously or performed in-house; whether a contractor was involved in the design or writing of the RFP; or why the ministry chose to compete the opportunity.

In addition to directing questions to the contact person on the RFP, proponents can ask questions during a [Proponents' Meeting](#) or they can direct questions to [Purchasing Services Branch \(PSB\)](#) or [Strategic Acquisitions and Technology Procurement \(SATP\) Branch](#) of Common Business Services (CBS).

Can RFPs change after they have been advertised?

Yes. The Province reserves the right to modify the terms of any RFP at any time at its sole discretion, including the right to cancel an RFP at any time prior to entering into a contract with a proponent. In most circumstances, an RFP process is completed without any changes to the terms and conditions of the RFP document. However, there are occasions where an RFP closing time may be extended or additional information related to the project may be added to the RFP. [Section 5.5](#) provides guidance on government's standard processes for advising interested vendors of any changes to an RFP.

## 4 DECIDING WHETHER OR NOT TO RESPOND

Preparing a proposal is time consuming. How do I decide whether it is worth my while to submit a proposal?

Every interested proponent will need to ask themselves this question, as the level of effort put into preparing a proposal will depend on each vendor's unique circumstances. An understanding of both the project requirements and the extent of interest from other vendors in the opportunity may help proponents answer this question.

Many competitions include a Proponents' Meeting, which can be a good source of information about who is interested in the project, as well as the project itself. Even if an interested vendor (i.e., a potential proponent) does not attend the meeting, information from the meeting will usually be made available.

What will happen if I do not submit a proposal?

In the majority of instances, a decision not to submit a proposal will not impact a vendor's eligibility to compete on future projects. However, if the Request for Proposals (RFP) is the first stage of a multi-stage project, a decision not to participate now may limit a vendor's ability to participate in subsequent stages of the project.

What if I do not agree with all of the terms of the RFP document?

Government's RFP process is designed to ensure that all proponents are treated fairly. The terms and conditions in the RFP document represent the rules of the RFP process, which are applicable to all proponents. Consequently, non-compliant, conditional, or counter-offer responses cannot be considered.

Some RFPs may allow for alternative solutions to be presented. If this is not explicitly outlined in the document, then proponents should ensure their proposals meet the requirements outlined in the RFP document in order to be given full consideration.

What if I do not understand all of the terms in the RFP document?

If proponents do not understand all of the terms and conditions listed in the RFP document, they are advised to request clarification from the ministry contact or from Common Business Services (CBS), as early as possible. In addition, proponents should not assume that contract terms will be negotiable unless this has been confirmed with the RFP contact person.

What if my proposal is successful and my plans have changed? Will I be free to back out?

No. A proposal represents an offer as defined by contract law and it cannot be rescinded after the closing date and time. A proposal can be amended or withdrawn up until the closing time, but at the stated closing time all proposals become irrevocable.

How many firms are invited to submit a proposal?

Depending on the estimated value of the project, a ministry may invite as few as three firms to submit proposals or it may invite all known vendors of the product or service. Ministries may also choose to issue the RFP only to those companies on a pre-qualified supplier list. However, ministries will often supplement a pre-qualification list by posting a bid opportunity notice on [BC Bid](#), in a newspaper, or in the [Journal of Commerce \(for construction projects\)](#), to ensure all qualified proponents are given the opportunity to compete.

Will you accept proposals from firms other than those invited?

Proposals will usually be accepted from any firm that expresses an interest in submitting a proposal. Exceptions to this include multi-stage processes that may involve the development and use of a pre-qualified supplier list.

## 5 PREPARING THE PROPOSAL

Before starting to prepare a proposal, proponents must read through the Request for Proposals (RFP) document and be sure that they fully understand all instructions and information provided. Any questions or concerns should be directed, in writing, to the contact person named in the RFP document.

### 5.1 Proposal Format

What format should my proposal take?

RFP documents will usually provide direction on how to structure the proposal, as common formats make it easier for the evaluation committee to review and compare proposals. At a minimum, proposals should include:

- A title page displaying the RFP number; the RFP closing date and time; the proponent's name, address, telephone number, fax number, and e-mail address; and the name of a contact person.
- A one page letter of introduction, signed by an authorized signatory for the proponent.
- A table of contents including page numbers. (Ensure all pages are numbered.)
- An executive summary—a one or two page summary of the key features of the proposal.
- The body of the proposal that clearly addresses all evaluation criteria.

Proponents may also include additional information as appendices to their proposal document.

### 5.2 Proposal Content

What makes one proposal better than another?

The proposal that best demonstrates its ability to meet the ministry's defined requirements will receive the highest score. Two elements must be determined before embarking on the drafting process: the audience and the solution.

The audience is usually fairly easy to ascertain—it will be the ministry and/or Common Business Services (CBS). Proposals are generally evaluated by staff from the program area that issued the RFP, as they will

be actively involved in the subsequent contract. In addition, CBS may be involved with both the RFP and the contract processes.

The proponent’s proposed solution must respond directly to what the ministry is looking for. A proposal must be able to convince the reader that:

- the ministry’s need or problem is clearly understood by the proponent;
- the ministry’s objectives will be achieved by entering into a contract with the proponent;
- the proponent has the ability and proven expertise to deliver the proposed solution;
- the proponent has considered the risks involved with their solution and identified how they will mitigate/reduce any risk to the Province; and
- the proposed solution will add value to the ministry’s operations.

How much detail should I include in my proposal?

Evaluating proposals involves more than checking boxes to indicate whether or not a criterion has been addressed. Therefore, it is not enough to tell the ministry that you can complete a task; the ministry wants to know *how* you plan to complete the task. It is important to avoid simply paraphrasing the ministry’s requirement. Following are two examples that detail both insufficient and recommended responses.

**Example One: Solution**

<b>Statement in RFP</b>	Building should be readily accessible by people with physical disabilities.
<b>Insufficient Response</b>	Our building is readily accessible by people with disabilities.
<b>Recommended Response</b>	Our building was selected with our clientele in mind. We are on a main bus route, the front door of the building is right on the sidewalk in front of the bus stop, and there is a parking lot directly beside the building with a drop-off zone and parking stalls for people with disabilities. The floors inside the building are covered with non-slip coating and are painted with clearly visible markings to assist persons who are visually impaired. Although there is a large elevator to the second level, most events take place on the main floor, which has no steps. The information/security desk at the building entrance is staffed at all times.

## Example Two: Qualifications

<b>Statement in RFP</b>	Proponents should have extensive experience in this or a related field.
<b>Insufficient Response</b>	Proponent has extensive experience in this field.
<b>Recommended Response</b>	<p>The proposed project manager has been a technical writer for twenty-three years. For nine years she was with the Canadian General Standards Board, responsible for providing technical writing training and advice to staff and clients. She now lectures on Technical Writing at the University of British Columbia. A list of her recent publications is attached as Appendix D.</p> <p>In addition to her lecturing, in the last three years the proposed project manager has completed the following contracts:</p> <ul style="list-style-type: none"> <li>• Co-ordinating the writing and production of both on-line and hard copy user guides in Microsoft Excel Version 6.0.</li> <li>• Preparation of technical documentation for maintenance of Vancouver's SkyTrain.</li> <li>• Editing quality control manuals for three Lower Mainland manufacturers, all of whom subsequently became ISO 9000 certified.</li> </ul> <p>The other three proposed project team members are experienced and fully qualified technical writers holding diplomas in technical writing from either Simon Fraser University or the University of British Columbia.</p>

Sometimes an RFP will specifically request résumés for the project team members included in the proposal. If résumés are not mentioned, but the experience and skills of the project team are being evaluated, it is recommended that proponents include résumés. The rule of thumb is to ensure that the résumés are relevant to the evaluation criteria.

Should résumés be customized for each proposal?

Yes. To the extent practical, résumés should be tailored to the requirements stated in the RFP, and should highlight skills and experience relevant to the project.

If I have a history with the ministry, do I still need to describe my company's experience in detail?

Yes. Each proposal must stand alone and be assessed on its own merit. Therefore, to ensure fairness to all proponents, only the information included in each proposal will be considered during the evaluation process.

Does an RFP usually provide a budget?

There are several ways an RFP can be set up.

- Usually, an RFP will describe the problem and ask proponents for both a solution and a price to deliver that solution.
- On occasion, the ministry, through the RFP document, will describe the project and provide proponents with the budget amount, in effect, saying, "How much of our wish list can you provide for this dollar value?" RFPs using this strategy often include a mandatory budget amount that proposals must not exceed.
- If the budget amount is not stated in the RFP, ministries may provide an idea of the available funds, but most often they will not. This is in part because when government is looking for creative solutions to situations, they are often interested in seeing a range of solutions and prices. Stating the budget figure may limit options offered by proponents.

Do I have to worry about submitting my best price now or will prices be negotiated later with the successful proponent?

As price is usually evaluated along with all other aspects of the proposal, proponents should put forward their best price in the proposal. Although the ministry sometimes negotiates details with the successful proponent, the preference is for a proposal that meets all the requirements without need for further negotiation. If a ministry intends to negotiate price with the successful proponent, this information must be included in the RFP.

What should be included in the executive summary?

The executive summary should explain the proposal in simple terms and be no more than two pages long. It should summarize both the anticipated results and the process the proponent intends to follow to achieve these results. The executive summary should contain all the basic elements of the proposal so that anyone not on the evaluation committee can read the summary and understand exactly what is being proposed. The summary should be written in plain English and be readily understood by a layperson. In addition, technical details should be avoided in an executive summary unless they are essential to providing an understanding of the proposal.

I could offer a highly detailed proposal or a bare-bones version. Which one is going to be successful?

The evaluation criteria, not length of proposal, are the key to success in an RFP process as they define how proposals will be evaluated. The desirable criteria and their relative weightings are the best indicators of how detailed a proposal should be.

### 5.3 Submission Process

If I have two good ideas, can I submit them both?

Yes. However, if a proponent chooses to submit more than one idea, each idea must be submitted as a separate, stand-alone proposal.

Is submitting a signed RFP cover page an important step?

Yes. The nature of the information required on the RFP cover page makes it a critical part of each RFP process. If the RFP cover page is required, the entire unaltered, completed, and originally signed RFP cover page must be included with each proposal. It is recommended that the original cover page be included with the first copy of each stand-alone proposal submitted, with copies of the cover page being attached to the additional copies of each stand-alone proposal.

On occasion, an RFP document may direct proponents to include a signed cover letter rather than a signed cover page.

Can I submit my proposal electronically?

On selected competitions, proponents may be able to submit a proposal electronically through [BC Bid](#) (called an *eBid*). The BC Bid website provides information on how to register and subscribe to this service. If the RFP document does not state that proposals may be submitted electronically, or electronic submissions are not provided for on a BC Bid posting, printed proposals must be delivered to the closing location stated in the RFP.

**Note:** eBidding is not the same as submitting proposals by e-mail or fax.

How soon after the closing date will a decision be made?

The timing of the decision is dependent on the time it takes to evaluate all of the proposals received. Delays can occur during the reference check step or they may be caused by challenges in getting the evaluation committee together. All proponents, both successful and unsuccessful, will usually be notified of the outcome within two weeks of the award decision, provided that the ministry has all the necessary approvals to proceed.

## 5.4 Time Commitments

How much time can I expect to spend on preparing a proposal?

It is difficult to provide advice on time commitments because so much depends on the complexity of the requirement and the magnitude of the potential contract. Some proposals may take as little as half a day to prepare, while others may take a week or even several months to develop. The preparation time required is also dependent on whether the proponent has experience with preparing proposals and whether the proponent chooses to involve others, such as professional proposal writers, in the process.

How can I prepare a work schedule with accurate timelines when so much depends on decisions the ministry makes as the project unfolds?

Proponents may need to make certain assumptions in order to develop a work schedule that highlights the various decision points relevant to their proposal. Whenever assumptions are made, the proposal must include a clear explanation of the assumptions and explain how different decisions might affect the work schedule. However, if the ministry defines when the work must be done, each proposal must clearly illustrate how these timelines will be met.

## 5.5 Other Issues

How do I make sure I hear about any changes made to an RFP before it closes?

The RFP document will include information on the process for advising interested proponents of any changes made to the RFP prior to the closing date and time. Many RFPs will state that any changes will be posted to the BC Bid website exclusively. Registered BC Bid subscribers who have expressed interest in the opportunity will receive automatic e-mail notices when the opportunity is amended. If interested proponents are not registered BC Bid subscribers, it is their responsibility to review the BC Bid website on a regular basis to check for updates.

Alternatively, some RFP documents will include a Receipt Confirmation Form as an appendix. Interested proponents should complete and return this form to the address indicated. The completed Receipt Confirmation Form will ensure that interested proponents are sent any further information relating to the RFP, including amendments or minutes of any Proponents' Meetings.

Proposal preparation is costly; can I be reimbursed for my expenses?

No. It is acknowledged that preparing a proposal can be expensive. However, government believes that the RFP process is the most fair and effective way to solicit ideas and to provide all vendors the opportunity to compete for government business. Although every effort is made to minimize expense to proponents, government is not prepared to pay for the cost of preparing proposals.

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Is sub-contracting acceptable?

Yes. Sub-contracting is usually acceptable as long as no potential or perceived conflict of interest is created. The RFP usually asks proponents to identify all sub-contractors and state that they (the proponents) are willing to take responsibility for work performed by the sub-contractor(s). If a proponent is awarded the contract and later wants to change one of the sub-contractors, approval from the ministry is required.

Can I get together with another proponent to submit a joint proposal?

Yes. However, the proposal must clearly identify one proponent who will take overall responsibility for the work performed. In addition, this proponent must be a legal entity with whom the Province can enter into a contract. Again, this is permitted only where no real or perceived conflict of interest is created.

Are there any other tips on how I can enhance my proposal?

The following points are provided as suggestions to consider when developing proposals in response to an RFP.

1. Avoid underestimating the evaluation committee. Individuals responsible for evaluating the proposals are knowledgeable in their fields. Proposals that contain a lot of gloss but little substance will not score well.
2. Follow the format suggested in the RFP, using the same section headings to ensure that all requirements are covered.
3. Avoid using a proposal as an opportunity to point out flaws in the ministry's existing program, unless it is necessary to do so in order to describe the benefits of your proposal. Proposals should be upbeat and positive, and should be solution-oriented.
4. Avoid imposing conditions on the ministry. Conditions may make it too difficult for a ministry to accept a proposal.
5. Define any acronyms used and refrain from using technical jargon. A proposal should stand on its substance and the description of the proposed solution should not be overly complicated.
6. Clearly state any assumptions that are made in preparing a proposal.
7. Avoid relying on anyone else to submit the proposal on time. Late proposals cannot be accepted, regardless of the reason for being late.

Can you provide a proposal checklist?

Some RFP documents include the following checklist as a guide for proponents.

- Everyone involved in creating the proposal has read and understood the requirements.
- The Receipt Confirmation Form has been submitted (if applicable).
- The proposal addresses everything asked for.
- The proposal meets all the mandatory requirements.
- The requested copies of the proposal have been made.
- The proposal clearly identifies the proponent, the project, and the RFP number.
- The proponent's name and the RFP number appear on the proposal envelope.
- The proposal will definitely arrive at the closing location before the closing time stated in the RFP.
- The proposal is being delivered using a method consistent with the terms of the RFP.
- The complete, unaltered RFP cover page has been signed and the original copy is attached to the first copy of the proposal.
- If the proposal is being submitted through BC Bid's e-bidding functionality, all file attachments have been uploaded and the company e-bidding key has been entered.

## 6 THE PROPONENTS' MEETING

### What is a Proponents' Meeting?

A Proponents' Meeting is intended to provide an opportunity for all interested vendors to access the information they need to develop a sound proposal. The meeting provides potential proponents with an opportunity to ask questions, gather additional information, and express concerns. For example, vendors (i.e., potential proponents) may:

- seek clarification on anything that is unclear in the Request for Proposals (RFP) document;
- ask whether the service was previously contracted or performed in-house;
- ask about the ministry's anticipated time frame for awarding the contract, as well as the anticipated time frame for completing the project; or
- network with other vendors attending the Proponents' Meeting in order to determine who else is interested in the opportunity, and/or to investigate the possibility of submitting a joint proposal.

The Proponents' Meeting is hosted by government, usually in the town or city where the work is to be performed. Minutes or a transcript of the meeting are taken and are made available to all interested proponents, including those who were unable to attend the meeting. This information is often shared via an amendment to the RFP posting on BC Bid.

### Is attendance at a Proponents' Meeting mandatory?

Attendance at a Proponents' Meeting is usually optional. However, where attendance at a Proponents' Meeting is stated as being mandatory, proponents must attend in order for their proposal to receive consideration.

### Can I ask questions without having the competition find out who asked?

Proponents are usually offered the opportunity to submit questions in writing in advance of the meeting in order to allow for some anonymity. These questions will be presented and answered at the meeting without identifying the enquirer.

Asking poorly worded questions at a Proponents' Meeting can result in proponents giving away their ideas and their competitive edge. Therefore, it is a good idea to spend some time in advance of the meeting preparing any questions. For example, proponents should avoid questions such as, "Would the following approach be acceptable?"

## 7 PROPOSAL PRESENTATION AND SUBMISSION

Does it matter how my proposal looks?

Proponents are advised to prepare proposals that are professional and organized. A well articulated proposal will make it easier for the ministry to locate and evaluate the information they need, which will reflect positively on the proponent.

Each separate proposal submitted should highlight the different aspects of the proposed solution. The following points are provided as considerations to complement a proponent's best judgment when preparing responses to a Request for Proposals (RFP).

- Use a binding method that works, even if it is only a staple. The pages should not fall out when the evaluation committee reads a proposal.
- Use short paragraphs and leave plenty of white space on each page.
- As much material as possible should look as if it was created specifically for the proposal. All attachments should be pertinent to the proposal. Keep in mind that too much material may detract from important aspects of the proposal.
- When referring to an attachment, proponents are advised to be specific as to where additional information can be found. Referring generally to large attachments that contain only a page or two of pertinent information is not recommended, as evaluators may be unable to find the relevant information.
- Related topics should be kept together and statements should not be repeated in the proposal (except, perhaps, statements used in the executive summary).
- Avoid cross-references to the extent possible, as it can be difficult for evaluators to evaluate the proposal if they have to frequently jump between sections to get the full picture.
- If colour is used to highlight points, it should be used sparingly for greater impact. Any photographs used to illustrate a point should be clear.
- Format the proposal in a simple and attractive manner. Limit the number of typefaces used and keep the font sizes consistent throughout the document. Avoid excessive use of formatting options (e.g., bold, italic, and underline).
- Always number the pages, preferably with one numbering series from the first page to the last page.

- Make sure each copy of the proposal submitted includes all pages. Missing pages or other missing information cannot be considered after the closing date and time.

How much emphasis should be put on grammar, spelling?

Each proposal should be easy to read and understand. The use of plain language and short, clear sentences enhances the clarity of a document. Spelling and grammar should be accurate.

How long should the proposal be?

The proposal should be only as long as necessary to provide the information requested. Some RFP documents may state a maximum number of pages or words for response sections.

Should I submit my proposal in electronic format or in printed form?

Unless the RFP states otherwise, a printed document, with the requested number of copies, must be submitted to the closing location. However, the ministry will sometimes request that the proposal—or a portion of the proposal—be submitted in electronic format. In addition, some RFP documents may allow for electronic submission of proposals through [BC Bid](#). Interested proponents must read the RFP carefully for instructions regarding details for submitting proposals.

Do I really need to provide so many copies of my proposal?

Yes. Proposals are usually evaluated by a team of people. In order to give your proposal fair consideration, each member of the evaluation committee will need a copy, so a number of copies (often five or six) may be requested. This will ensure that each proposal, looking the way it was intended to look, is provided to each member of the evaluation committee.

Can I submit my proposal by fax?

Usually not, but if the RFP does not make reference to faxed proposals it would not hurt to ask.

How important are the noted closing date and time?

The closing date and time are extremely important. Proposals received after the closing time will not be evaluated.

Proponents should review the language regarding the closing time in the RFP. If the RFP states that “proposals must be received before 2:00 p.m. on August 31, 2005,” a proposal that is received at exactly 2:00 p.m. on August 31, 2005 will be rejected.

## 8 EVALUATION OF PROPOSALS

How are proposals evaluated?

The evaluation process consists of four distinct steps:

1. Shortly after the closing time, the evaluation committee meets to review the proposals. The first thing the committee does is make sure each proposal has met all of the mandatory criteria. Those not meeting all mandatory requirements are put aside and will receive no further consideration. Proposals that pass this stage are then distributed to all members of the evaluation committee. The committee members generally read each proposal individually and then meet as a group to discuss and evaluate each proposal against the desirable criteria.
2. In comparing each proposal against the desirable criteria, the evaluation committee awards points to indicate how well the proposal performed against each of the desirable criteria. This evaluation may be done twice: individually by each committee member and then by the full evaluation committee. The overall points awarded may be an average of all individual scorings or scores may be determined by consensus of the full committee. Either way, the proposal is discussed in detail and opinions are exchanged as to the extent to which each criterion has been addressed. A scoring sheet similar to the one provided at the end of this section, with additional space for comments, is often used.
3. After proposals have been evaluated against the desirable criteria, a successful proponent will be identified. If the Request for Proposals (RFP) document specifies that the evaluation process will include reference checks for the lead proponent, the ministry may check references at this point. If the lead proponent still proves to be successful after the reference checks, it will be confirmed as the successful proponent. If the lead proponent fares poorly on the reference checks, the ministry has the right to check the references of the proponent with the next highest ranking. This process will continue until a successful proponent is confirmed. Any reference checks that will form part of the desirable evaluation criteria or as a final check for the lead proponent must be clearly stated in the RFP document.
4. Once a successful proponent is selected, all proponents are notified and a date is set with the successful proponent to commence discussions relating to the contract.

What is the evaluation committee looking for?

The evaluation committee is looking for the proposal that best meets the desirable criteria listed in the RFP document. The committee scores each

proposal against these criteria at the level to which they are detailed in the RFP. Sometimes the RFP document provides only broad headings, such as proponent experience 40%, suitability of solution 20%, and price 40%. In other RFP documents, these headings may be broken down into sub-criteria for assignment of points. It is important to note that the sub-criteria only enlarge upon the higher-level criteria.

Will I be given the opportunity to make a presentation to explain my proposal?

Not usually. The proposal should contain all details of the proposed solution so that it can be evaluated without the need for additional information. If presentations are planned, the process is generally described in the RFP.

How does government document their evaluation of proposals?

The following table is an example of a scoring sheet that may be used to document the evaluation of proposals.

Example 3: Scoring Sheet

	Weighting	Available Points	Min Score	Proponent A	Proponent B
<b>Mandatory Criteria</b>	<b>0%</b>	<b>0</b>			
Required number of copies		Yes/No			
Tracking tool is compatible with government software		Yes/No			
Project team has required credentials		Yes/No			
<b>Desirable Criteria</b>	<b>100%</b>	<b>200</b>			
<b>Suitability of solution</b>	<b>40%</b>	<b>80</b>	<b>50</b>		
Consistency of solution with program goals		30			
Creativity of proposal		25			
Implementation plan		25			
<b>Price</b>	<b>35%</b>	<b>70</b>	n/a		
Score = (lowest proposed price/this price x total points)					
<b>Vendor Background</b>	<b>25%</b>	<b>50</b>	n/a		
Experience		25			
Team skills		25			
<b>TOTALS</b>	<b>100%</b>	<b>200</b>			

## 9 THE CONTRACT

Who can I expect to see during contract negotiations?

It all depends on the size of the project. Proponents often see three or four ministry employees who each have responsibility for some aspect of the project. Occasionally, the successful proponent will also meet with a Common Business Services (CBS) representative.

What if government and the successful proponent cannot reach agreement on contract terms?

Most Request for Proposals (RFP) documents include a provision stating that if agreement cannot be reached with the successful proponent within thirty days, government reserves the right to stop negotiations and move on, either by attempting to reach an agreement with the proponent who ranked second or by cancelling the RFP process.

The required insurance is expensive. Does government ever help out with insurance?

The contract usually requires contractors to indemnify the government against any losses it incurs as a result of the contractor's activities in performing the contract. To ensure that contractors fulfil this indemnity, government requires evidence of adequate liability insurance. Arrangement and payment of this insurance are generally the contractor's responsibility. However, where the contractor will be delivering services directly to the public on behalf of the Province, the contractor can sometimes arrange to obtain the insurance through the government. For additional information on insurance options for a particular RFP, contact the person identified in the RFP document or [CBS](#). Additional information on government's insurance requirements can be found on [Schedule D](#) of the General Services Agreement.

How are contract disputes resolved?

Every government contract will include a clause that identifies how a contract dispute will be resolved. Unless both parties agree to a different process, contract disputes are to be referred to and finally resolved by arbitration under the *Commercial Arbitration Act*. However, efforts are made to resolve differences without the need for arbitration.

Can ideas from my unsuccessful proposal be incorporated into the contract with the successful proponent?

No. This would be contrary to government policy.

## 10 FEEDBACK

Can I get feedback afterwards to find out how I can do better next time?

Yes. Once the decision has been announced, the ministry will give unsuccessful proponents the opportunity to request a debriefing. Instructions on making this request will be included in the contract award announcement. A debriefing will be conducted either through a meeting or by means of a telephone conversation with one or more members of the evaluation committee. Sometimes the debriefing can take place immediately; other times the ministry will wait until a contract is signed with the successful proponent.

What is the point of attending the debriefing?

The debriefing gives a proponent an opportunity to learn about their proposal's strengths and weaknesses. This feedback may identify areas where the proposal could have been stronger and it may identify situations where experience is lacking. Overall, the proponent gains an awareness of actions to take to improve their chances of success on future contract opportunities with government.

What information is available to me at the end of the process?

Government's standard practice is to release:

- the unsuccessful proponent's total score, as well as the detailed score and comments for each of the desirable criteria presented in the Request for Proposals (RFP) document;
- the name of the successful proponent; and
- the dollar amount of the contract that was awarded.

Will I be able to change the ministry's mind?

No. The debriefing is intended to provide proponents with an opportunity to improve their ability to compete on the next RFP rather than as an opportunity to challenge the ministry's decision on a completed RFP process. If proponents have concerns with a ministry's decision or with the RFP process, these concerns should be raised with the contact person identified in the RFP document.

Where do I raise concerns I might have with the fairness of the process?

Although there is disappointment with not being successful, most proponents find that the debriefing process provides useful feedback and satisfies them that the process was conducted fairly. If a proponent still has concerns with the process, they should initially address their complaint to the contact person identified in the RFP document. This step will initiate a [Vendor Complaint Review Process](#). The ministry will evaluate the issue and provide a response to the proponent. If the issue is not resolved to the proponent's satisfaction, the proponent may raise the issue with the [Procurement Governance Office](#).

## 11 CONTACTS

The two branches within Common Business Services with responsibility for supporting government procurement activity are: Purchasing Services Branch and Strategic Acquisitions and Technology Procurement Branch. Either branch can be contacted for advice and assistance related to the procurement process. The Procurement Governance Office is available to provide advice on procurement policy.

### **Purchasing Services Branch**

Phone: 250 387 7300 (Victoria)  
250 828 4322 (Kamloops)  
Fax: 250 387 7309 (Victoria)  
E-mail: [PCADMIN@gov.bc.ca](mailto:PCADMIN@gov.bc.ca)  
Website: [www.pc.gov.bc.ca/](http://www.pc.gov.bc.ca/)

### **Strategic Acquisitions and Technology Procurement Branch**

Phone: 250 387 1457  
Fax: 250 356 0846  
E-mail: [SATP@gov.bc.ca](mailto:SATP@gov.bc.ca)  
Website: [www.saip.gov.bc.ca/satp/contacts.htm](http://www.saip.gov.bc.ca/satp/contacts.htm)

### **Procurement Governance Office**

Phone: 250 356 8331  
Fax: 250 356 6164  
E-mail: [procurementgovernance@gov.bc.ca](mailto:procurementgovernance@gov.bc.ca)  
Website: [www.fin.gov.bc.ca/ocg/pgo/pgo.htm](http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm)

## 12 GLOSSARY AND DEFINITIONS

### **Contractor**

A contractor is a supplier to government who is providing goods or services subject to the terms and conditions of a contract with the Province. Most often, the term contractor is used to refer to a supplier of services.

### **Evaluation Committee**

An evaluation committee is a group of individuals responsible for evaluating proposals received in response to a competitive procurement process, such as a Request for Proposals (RFP). The evaluation committee will include some ministry representation and may also include a representative from Common Business Services (CBS).

### **Invitation to Quote (ITQ)**

Invitation to Quote (ITQ) refers to the process and document used in government to solicit bids or quotes from vendors for the provision of clearly specified goods or services. The bids received in response to an ITQ are evaluated on price only.

### **Pre-qualification List**

A pre-qualification list is a list of potential suppliers who have been pre-qualified for a specific or future procurement opportunity.

### **Proponent**

The term proponent refers to a vendor who responds to a Request for Proposals (RFP) by submitting a proposal. The successful proponent is the vendor who is selected from the competitive process to supply government with the goods or services required.

### **Receipt Confirmation Form**

The Receipt Confirmation Form provides the Request for Proposals (RFP) issuer with contact information for any interested proponents, so that additional information or amendments to the RFP can be distributed appropriately.

### **Request for Expressions of Interest (RFEI)**

Request for Expressions of Interest (RFEI) refers to a process and document used in government to obtain information on the level of interest in a planned solicitation opportunity and may be used to pre-qualify vendors for an opportunity. It is often used when ministries know that a good or service is available but are not sure

if the vendor community is interested or available to compete on the opportunity.

### **Request for Information (RFI)**

Request for Information (RFI) refers to a process and document used in government to obtain information to be used in developing a future solicitation opportunity. It is often used to obtain specific information about a product, service, or process, as well as the availability and performance of the goods or services.

### **Request for Proposals (RFP)**

Request for Proposals (RFP) refers to the process and document used in government to solicit proposals from vendors which will be evaluated on price as well as other criteria, including vendor qualifications and the proposed solution.

### **Request for Qualifications (RFQ)**

Request for Qualifications (RFQ) refers to the process used to pre-qualify suppliers who are interested in a current opportunity or for pre-qualifying suppliers who are interested in supplying goods or services in the future on an if, as, and when requested basis.

### **Solicitation**

Solicitation involves the act of obtaining bids, quotes, offers, or proposals.

### **Supplier**

The term supplier is often used interchangeably with the term vendor. However, in the context of government procurement, a supplier is a vendor who has been selected through a procurement process to supply government with goods or services.

### **Vendor**

In the context of government procurement, any party that is in the position of being able to sell goods or services to government (i.e., a potential supplier) is a vendor. Solicitation processes are designed to solicit bids and proposals from many vendors.

### **Vendor Complaint Review Process (VCRP)**

The Vendor Complaint Review Process (VCRP) is defined in government policy and overseen by the Procurement Governance Office. It is intended to provide access to a consistent, fair, and timely process to deal with vendor complaints concerning the government's procurement process, and to identify ways to make improvements in that process. The process is limited to ministries and agencies that are governed by the *Financial Administration Act*.

## 13 QUICK LINKS

Agreement on Internal Trade (AIT)

<http://strategis.ic.gc.ca/epic/internet/inait-aci.nsf/en/Home>

BC Bid website

<http://www.bcbid.gov.bc.ca/open.dll/welcome>

Core Policy and Procedures Manual

[http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/06\\_Procurement.htm](http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/06_Procurement.htm)

*Procurement Services Act*

[http://www.qp.gov.bc.ca/statreg/stat/P/03022\\_01.htm](http://www.qp.gov.bc.ca/statreg/stat/P/03022_01.htm)

Procurement Governance Office (PGO) website

<http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm>

Purchasing Services Branch (PSB) website

<http://www.pc.gov.bc.ca/>

Schedule D, Insurance Requirements, General Services Agreement

<http://www.pc.gov.bc.ca/psb/GSA/Draft%20Schedule%20D.doc>

Strategic Acquisitions and Technology Procurement (SATP) Branch  
website – contact information

<http://www.saip.gov.bc.ca/satp/contacts.htm>

Vendor Complaint Review Process (VCRP)

<http://www.fin.gov.bc.ca/ocg/pgo/VCRP.htm>